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TOBACCO Situation

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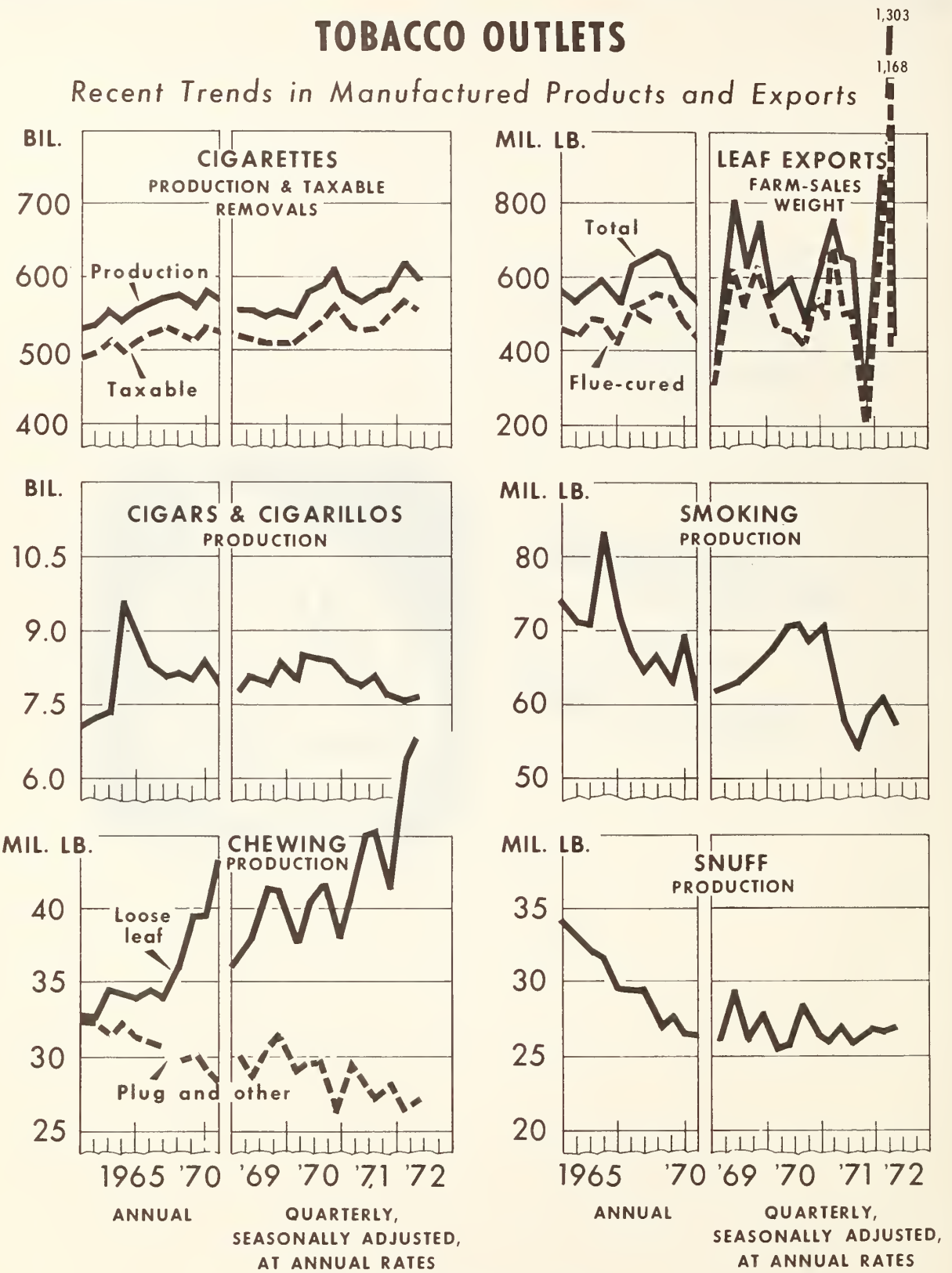
TOBACCO OUTLETS

Recent Trends in Manufactured Products and Exports



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THE TOBACCO SITUATION

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Approved by
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and Summary released
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The *Tobacco Situation* is published in March, June, September, and December.

SUMMARY

Despite record world cigarette output, reduced U.S. exports are lowering total use of U.S. leaf tobacco for the 1971/72 marketing year from the previous year's level. But leaf use will still exceed the 1971 crop. As a result, carryover of U.S. tobacco will fall about 4 percent from last year's 3.67 billion pounds to the least amount since 1952.

Increasing population and another recovery in the smoking rate raised domestic cigarette consumption (taxable removals, plus estimated inventory changes) for the 10 months ended April 1972 about 4 percent above a year earlier. Cigarette output in the year ending June 30 will likely be up 2 percent from the 585 billion cigarettes produced last year.

In contrast to the cigarette increase, use of cigars and smoking tobacco is down. For the year ending June 30, cigar and cigarillo consumption may fall about 5 percent below the 8.1 billion in 1970/71. Chewing tobacco production may gain. Snuff production may change little.

Unmanufactured tobacco exports made a sizable recovery in January and February, so the July 1971-April 1972 total was only moderately below a year earlier. For the year ending June 30 total shipments are probably down around 5 percent from the 555 million pounds of the previous year. Exports to Japan have gained this season; the United Kingdom and West Germany have taken less.

In July-December 1972, exports should substantially exceed the 219 million pounds of a year earlier, when dock strikes held back shipments. Favorable economic conditions and an increasing demand for tobacco continue in the West European countries that are major customers.

Flue-cured exports were down a tenth in July 1971-April 1972, principally due to smaller shipments to the United Kingdom and EC countries. For the year ending June 30, about 365 million pounds (480 million, farm-sales weight) will be exported, 10 percent below 1970/71. Burley exports for the crop year ending September 30 should exceed both last year's level and the 1969/70 high of 48 million pounds (58 million, farm-sales weight).

Cigarette tobacco imports for consumption during July 1971-April 1972 rose 20 percent from a year earlier. Imports of cigar leaf were up 10 percent. U.S. manufacturer's stocks of imported cigarette tobacco on

April 1 were 2 percent below a year earlier and the smallest for that date since 1966. U.S. stocks of foreign-grown cigar tobacco on April 1 were down 17 percent. Last year's dock strike limited arrivals.

Despite cigarette output gains, domestic flue-cured use in the year ending June 30, is slipping 1-2 percent below last season's 27-year low. Allowing for lower exports, total disappearance for the crop will drop about 5 percent below the 1.17 billion pounds of last season. Disappearance will exceed the 1971 crop so the July 1972 carryover of flue-cured will likely fall about 2 percent below the 1.98 million pounds of a year earlier.

To receive price support on tobacco, growers must certify again this season that they did not use DDT or TDE pesticides on their crop. Analyses of the 1971 crop indicated some growers sold tobacco containing these pesticides. Accordingly, USDA has announced that the 1972 crop will be random sampled on all markets and samples will be chemically analyzed for residues. The law provides penalties for false certification.

Based on March 1 intentions, this year's flue-cured crop is projected 3 percent smaller than last year. For the new season, total supply—estimated carryover plus the projected 1972 crop—may be down about 2 percent. Auctions for the crop usually begin in the second half of July on type 14 (Ga.-Fla.) and type 13 (S.C.-N.C.) markets.

Disappearance of burley tobacco may total 3 percent above last season's 557 million pounds. This would leave an October 1 carryover about 8 percent below last year's 1,346 million pounds. The farm poundage quota, reflecting 1971's underquota marketings, is expected to result in a larger 1972 crop offsetting the smaller carryover, making supplies about equal to last season.

Auction markets for the 1971 crop of Maryland tobacco began April 18 and are scheduled to end June 23. Through June 15, prices averaged 82 cents per pound compared with 79 cents a year earlier. Quality of offerings declined, but prices for almost all grades increased. Although the 1972 Maryland tobacco crop may approximate 1971's, a smaller carryover will result in another reduction in supply next season.

Disappearance of cigar binder, wrapper, and dark air-cured tobaccos in the current marketing year may gain a little from last season. Use of fire-cured and domestic cigar filler tobaccos is declining. Nevertheless, estimated usage for most of these types of tobacco will exceed last year's crop, leaving less carryover into 1972/73. Tentative 1972/73 supplies—estimated carryover plus prospective production—are lower than the previous season for dark air-cured, cigar filler, and wrapper, but about the same for fire-cured and binder tobaccos.

TOBACCO PRODUCTS

Cigarette Use Up

With increases in the adult population and rising consumer incomes, U.S. smokers puffed 4 percent more cigarettes during the 10 months through April 1972 than the same period in 1970/71. The gain was maintained in January-April. Per capita use accounted for a part of the increase since adult population is increasing about 1½ percent annually. Gains in cigarette use are expected to continue in July-December 1972.

Use by U.S. smokers (including those overseas) in the year ending June 30, 1972, may have increased 4 percent to about 566 billion cigarettes. Domestic consumption accounted for the gain as shipments to overseas forces stayed at last year's low level. Consumption includes withdrawals of an estimated 8 billion from inventory following a buildup in 1970/71 (table 2).

Total U.S. cigarette output in 1971/72 is estimated at 595 billion—about 2 percent above last year's record. This includes about 34 billion cigarettes for export, and 2 billion for Puerto Rico and other U.S. possessions. During the 10 months through April 1972, exports rose one-fifth, reflecting the continuing upward trend in world cigarette consumption (table 1).

Retail prices have moved higher in the past 12 months, in part due to higher taxes. Wholesale prices haven't changed much. Since last July, 11 States increased cigarette tax rates, compared with 13 States in 1970/71 and 16 States and the District of Columbia in 1969/70.

Table 1.—U.S. cigarette exports to leading destinations, 1970-72

Country	1970	1971[1]	January-April[1]	
			1971	1972
	Millions	*Millions*	*Millions*	*Millions*
Hong Kong	3,167	3,824	1,182	1,326
Belgium-Luxembourg	1,161	2,729	362	917
Spain	1,745	2,391	524	945
Panama	1,222	1,602	394	683
Netherlands Antilles	1,406	1,530	540	561
Lebanon	496	1,510	628	496
Switzerland	1,384	1,209	220	369
Saudi Arabia	1,269	1,189	388	324
Ecuador	382	1,048	370	438
Kuwait	1,184	887	226	490
Japan	633	874	345	372
Other countries	15,114	12,999	4,025	3,826
Total	29,163	31,792	9,204	10,747

[1] Subject to revision.

Compiled from publications and records of the Bureau of the Census.

Cigar Volume Reduced

U.S. smokers and overseas forces smoked 6.3 billion cigars (including cigarillos) in the 10 months through

Table 2.--Cigarettes: Output, removals, and consumption, 1960-72

Year	Output	Removals					Total U.S. consumption 3/
		Taxable	Tax-exempt				
			Total	Exports	Puerto Rico 1/	Overseas forces 2/	
		Billions					
1960	506.9	470.1	37.0	20.2	2.5	14.3	484.4
1961	528.3	488.1	39.6	22.2	2.8	14.6	502.7
1962	535.5	494.5	41.1	24.1	3.1	13.9	508.4
1963	550.6	509.6	41.1	23.6	3.2	14.3	523.9
1964	539.9	497.4	42.6	25.1	3.7	13.8	511.2
1965	556.8	511.5	44.2	23.1	3.9	17.2	528.7
1966	567.3	522.5	46.1	23.5	3.9	18.7	541.2
1967	576.2	527.8	49.0	23.7	3.9	21.4	549.2
1968	579.5	523.0	53.8	26.5	4.7	22.6	545.6
1969	557.6	510.5	47.1	25.0	3.7	18.4	528.9
1970	583.3	532.8	51.2	29.2	3.7	18.4	4/536.3
1971 5/	576.4	528.9	49.2	31.8	2.7	14.7	6/555.0
	Year ending June 30 --						
1964	535.0	495.1	40.8	23.7	3.5	13.6	508.7
1965	562.4	517.0	43.9	25.1	3.7	15.1	532.1
1966	562.7	516.1	47.2	23.4	4.1	19.7	535.8
1967	572.8	524.9	47.7	23.8	3.7	20.2	545.1
1968	570.7	522.6	48.7	23.5	4.1	21.1	543.7
1969	573.0	520.3	51.5	25.8	4.4	21.3	541.6
1970	562.2	511.7	51.0	28.6	3.8	18.6	530.3
1971	585.1	539.6	47.5	29.0	3.3	15.2	4/544.0
1972 7/	595.0	544.0	51.0	33.5	2.5	15.0	6/566.0

1/ Also includes Virgin Islands, Guam, American Samoa, Wake, and Canton and Enderbury Islands.
2/ Also includes ship stores and small tax-exempt categories.
3/ Taxable removals plus overseas forces.
4/ Excludes estimated inventory increase.
5/ Subject to revision.
6/ Includes estimated inventory decrease.
7/ Estimated.

Compiled from reports of Internal Revenue Service and Bureau of the Census.

Table 3.--Cigars and smoking tobacco: Output, removals, and consumption

Year and item	U.S. factories			From Puerto Rico: taxable	Imports	Exports	Total U.S. consumption 1/
	Output	Removals: Taxable	Removals: Tax-exempt				
	Millions						
Large cigars and cigarillos							
1965	7,899	7,578	180	913	25	55	8,641
1966	7,165	7,076	193	1,075	25	73	8,295
1967	6,858	6,846	197	1,099	30	76	8,096
1968	7,184	6,759	169	1,036	48	66	7,946
1969	6,931	6,739	169	1,080	45	65	7,968
1970	7,094	6,705	152	1,259	46	54	8,108
1971 2/	6,706	6,490	131	1,222	49	49	7,843
	Year ending June 30 --						
1965	8,445	7,912	176	850	25	45	8,918
1966	7,517	7,332	210	1,034	25	70	8,531
1967	6,883	6,864	183	1,072	26	74	8,071
1968	7,234	6,868	192	1,114	38	77	8,135
1969	6,868	6,633	156	987	46	62	7,760
1970	7,108	6,755	165	1,186	47	58	8,095
1971	6,956	6,718	139	1,237	47	55	8,086
1972 3/	6,340	6,300	155	1,250	50	65	7,670
	Million pounds						
Smoking tobacco 4/							
1965	71.8	67.3	3.0	---	2.1	1.0	71.4
1966	67.3	65.3	1.5	---	3.3	.9	69.2
1967	64.8	62.7	2.0	---	3.7	1.3	67.1
1968	66.3	64.1	1.9	---	5.5	1.8	69.7
1969	63.9	62.6	1.6	---	5.7	1.1	68.8
1970	69.4	65.6	1.5	---	8.7	.9	74.6
1971	60.5	61.3	1.4	---	8.4	1.2	69.6
	Year ending June 30 --						
1965	74.1	71.4	3.0	---	2.5	1.1	75.8
1966	69.8	65.4	2.4	---	2.8	1.0	69.6
1967	64.3	62.3	1.8	---	3.2	1.1	66.2
1968	66.9	64.6	1.9	---	4.6	1.3	69.8
1969	63.7	62.5	1.7	---	5.3	1.8	67.7
1970	67.2	64.2	1.6	---	7.0	.9	71.9
1971	67.0	64.8	1.5	---	8.7	1.1	73.9
1972 3/	58.0	57.5	1.4	---	11.0	1.1	68.8

1/Total removals (or sales) from U.S. factories plus those from Puerto Rico, and imports, minus exports. 2/Subject to revision. 3/Estimated. 4/After December 1965, taxable removals data replaced by domestic sales, and tax-exempt removals data replaced by export sales.

Compiled from reports of the IRS, Bureau of the Census, and AMS, USDA.

April 1972, 6 percent less than a year earlier. For the 1972 fiscal year, consumption may be down 5 percent from 1970/71 and well below the 1964/65 record. Demand has been weaker, in part reflecting the stronger cigarette demand. In 1971/72 U.S. smokers used more cigars from Puerto Rico but fewer from U.S. factories (table 3).

According to the annual survey by the Cigar Manufacturers' Association of America, sales of cigarillo-size cigars (weighing over 3 pounds but not over 10 pounds per 1,000) totaled 3 billion in calendar 1971. Traditional-size cigars generally weigh more than twice as much as the average cigarillo. Cigarillo sales (based on taxable removals) in 1971 were 38.4 percent of total sales of large cigars and cigarillos. This compares with 36.2 percent for 1970, and 13½ percent at the start of the 1960's.

Smoking and Chewing Tobacco

Smoking tobacco production for pipes and roll-your-own cigarettes has dropped. At the same time, cigarette sales have risen. In the first 9 months of 1971/72 smoking tobacco output fell 17 percent to 43.2 million pounds. Domestic sales, including imports, dropped 8 percent to 51.5 million pounds. U.S. manufacturers' sales dropped sharply; imports rose. Declines occurred in both pipe tobacco and cigarette cut (roll-your-own) sales. U.S. smoking tobacco consumption for the year ending June 30 may be down about 7 percent.

Smoking tobacco exports in bulk during July 1971-April 1972 were 4 million pounds larger than a year earlier. Continuing an upward trend of several years, exports probably will total one-sixth above the 29 million pounds of 1970/71 (table 4). Switzerland and the Netherlands are the leading destinations. Bulk exports consist mostly of blended and specially prepared cigarette leaf. These exports have gained due to the growing overseas popularity of American cigarette brands and American-type blended cigarettes. These cigarettes are manufactured in overseas factories of American-based companies and by foreign firms under license.

Chewing tobacco output in 1971/72 is estimated about 2 percent above the previous year; gains in loose leaf production more than offset a decline in plug chewing (table 4).

Snuff production in 1971/72 remained about the same as in 1970/71. Output appears to have stabilized following a long downtrend.

Table 4.—Tobacco products: Output, 1970-72

Item	Year ending June 30—		
	1970	1971[1]	1972[2]
	Million pounds	*Million pounds*	*Million pounds*
Chewing tobacco			
Plug	23.0	21.6	19.5
Twist	2.4	2.4	2.3
Fine-cut	4.9	4.9	5.2
Scrap	40.1	41.5	45.0
Total	70.4	70.4	72.0
Snuff	26.3	27.1	26.5
Smoking tobacco in bulk (exports)	20.1	28.8	33.0
	Million	*Million*	*Million*
Small cigars	870.8	911.7	1,600

[1]Subject to revision. [2]Estimated. Basic data compiled from reports of Internal Revenue Service and Consumer and Marketing Service, USDA.

U.S. EXPORTS AND IMPORTS

Leaf Exports Lower

For the year ending June 1972, exports of unmanufactured tobacco are estimated 4 percent below the above-average volume of 555 million pounds exported last fiscal year. Combined movement of tobacco under barter, short-term credit, and Public Law 480 may equal last year's 239 million pounds.

During July 1971-April 1972, shipments fell 4 percent to 448 million pounds of unmanufactured tobacco (export weight). The average unit value of exports increased 5 percent.

January-April exports of 229 million pounds were substantially above the 168 million pounds in the same months of 1971 as Japan's season shipments were bunched together in early 1972. Both the United Kingdom and West Germany, the leading destinations, reduced takings (table 5). Delayed shipments due to the October-November dock tie-up contributed to the high level in early 1972. But exports in May and June probably fell below the volume shipped during those months of 1971.

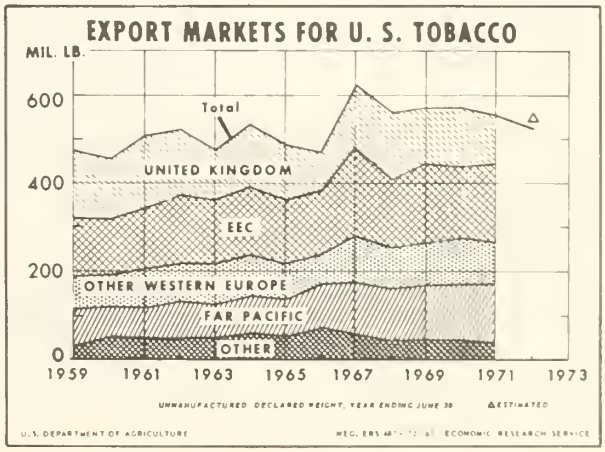


Table 5.--United States exports of unmanufactured tobacco by types and to principal importing countries for specified periods

(Declared weight)

Country and type	Average 1964-68	1969	1970	1971 1/	January-April 1971 1/	January-April 1972 1/	1972 as a percentage of 1971
	Million pounds						Percent
Flue-cured	408.0	429.6	368.2	341.8	130.1	161.9	124
Burley	46.4	52.0	41.4	36.5	8.2	18.8	229
Maryland	12.4	10.4	11.8	9.0	1.7	3.1	182
Fire- and sun-cured	25.6	25.5	24.2	22.6	6.4	9.8	153
Green River	.7	.4	.3	.4	.2	.1	50
One Sucker	.8	.4	.5	.6	.3	.1	33
Black Fat, etc.	3.5	1.1	2.7	2.5	1.0	1.3	130
Cigar wrapper	4.4	2.2	1.6	2.5	.4	.9	225
Cigar binder	2.0	.9	.3	.1	.1	2/	---
Cigar filler	.9	.6	.4	.3	2/	.2	---
Perique	.3	.1	.2	.1	.1	.2	200
Stems, trimmings, and scrap	35.6	54.1	58.8	57.0	18.9	32.3	171
Total	540.8	577.5	510.4	473.3	167.5	228.9	137
Country of destination							
United Kingdom	126.4	134.2	95.5	89.8	34.7	36.3	105
France	6.9	8.6	9.0	10.1	3.2	6.0	188
Belgium	18.3	17.4	12.4	15.6	6.9	3.1	45
Netherlands	36.7	33.6	26.6	28.1	7.8	7.9	101
West Germany	93.6	102.2	92.6	100.0	33.3	28.7	86
Portugal	5.1	6.3	4.9	2.7	2.3	1.0	43
Denmark	16.2	19.1	18.1	16.7	6.5	11.4	175
Ireland	12.9	10.5	10.2	9.0	5.7	7.2	126
Switzerland	18.1	26.4	24.7	18.2	8.6	8.2	95
Finland	5.6	5.9	5.0	4.8	1.8	2.7	150
Norway	8.1	7.2	8.1	4.3	1.0	1.2	120
Sweden	17.1	13.9	19.5	14.7	2.5	4.6	184
Italy	6.7	19.5	3.1	16.4	4.1	6.8	166
Spain	4.2	4.1	3.0	5.2	4.2	4.1	98
Thailand	18.5	24.3	20.1	18.9	7.1	9.9	139
S. Vietnam	10.6	10.8	10.8	17.2	5.5	7.5	136
Malaysia 3/	8.0	10.9	11.8	11.0	3.5	3.4	97
Hong Kong	6.4	4.2	4.3	2.7	1.2	1.0	83
Japan	37.9	40.9	58.6	18.6	1.2	46.2	4/
Australia	16.7	20.2	10.2	10.9	3.1	3.7	119
New Zealand	4.4	2.5	5.0	3.8	1.3	1.1	85
Egypt	9.5	2.6	.6	1.2	.9	.1	11
Other countries	52.7	52.2	56.3	53.5	21.1	26.7	127
Total	540.8	577.5	510.4	473.3	167.5	228.9	137

1/ Preliminary.
2/ Less than 50,000 pounds.
3/ Malaysia and Singapore.
4/ January-April 1972 exports were large due to the 1971 dock strike.
Detail may not add to total due to rounding.
Compiled from publications and records of the Bureau of the Census.

Table 6.--U.S. imports of unmanufactured tobacco for consumption and general, principal categories, and countries of origin, 1971 and January-April 1971-72 1/

(Declared weight)

Classification and country of origin	Imports for consumption				General imports (arrivals)			
	Total 1971	January-April 1/			Total 1971	January-April 1/		
		1971	1972	1972 as a percentage of 1971		1971	1972	1972 as a percentage of 1971
	-- Million pounds --			Percent	-- Million pounds --			Percent
Cigarette tobacco:								
Leaf, unstemmed								
Oriental								
Turkey	101.5	28.9	31.4	109	68.9	38.1	65.6	172
Greece	29.1	9.4	10.3	110	18.3	8.1	11.7	144
Yugoslavia	21.7	6.1	5.3	87	12.9	5.3	3.1	58
Other countries	11.6	3.1	6.5	210	12.2	7.6	12.0	158
Flue-cured and burley	4.4	.6	2.6	433	9.9	1.0	6.3	630
Sub total	168.3	48.1	56.1	117	122.2	60.1	98.7	164
Scrap								
Turkey	10.1	3.3	3.6	109	2.7	1.2	4.4	367
Other countries 2/	8.1	3.5	.5	14	3.5	.7	1.6	229
Total	186.5	54.9	60.2	110	128.4	62.0	104.7	169
Cigar tobacco:								
Wrapper	1.0	.2	.3	150	1.2	.4	.6	150
Filler--stemmed and unstemmed								
Dominican Republic	1.3	.4	.7	175	10.2	6.5	5.8	89
Other countries	5.1	1.4	3.6	257	25.7	8.3	10.2	123
Sub total	6.4	1.9	4.3	226	35.9	14.9	16.0	107
Scrap								
Philippine Republic	27.2	8.1	6.1	75	15.3	6.5	6.1	94
Colombia	4.6	1.5	1.6	107	1.0	.3	1.0	333
Dominican Republic	6.5	2.1	2.1	100	1.2	.4	.5	125
Brazil	4.1	.9	1.2	133	.9	.1	.1	100
Other countries	11.5	3.1	4.4	142	3.5	1.1	3.0	273
Sub total	53.9	15.7	15.4	98	22.0	8.5	10.7	126
Total	61.3	17.8	20.0	112	59.1	23.8	27.3	122
Stems	.8	.1	1.4	3/	.4	.1	.7	700
Grand total	248.5	72.9	81.6	112	187.9	85.9	132.8	155

1/ Preliminary.
2/ Canada, Greece, Cyprus, Lebanon, India, Korea.
3/ 1972 imports included shipments from Canada and Mexico for processing into tobacco sheet.
Detail may not add to total due to rounding.

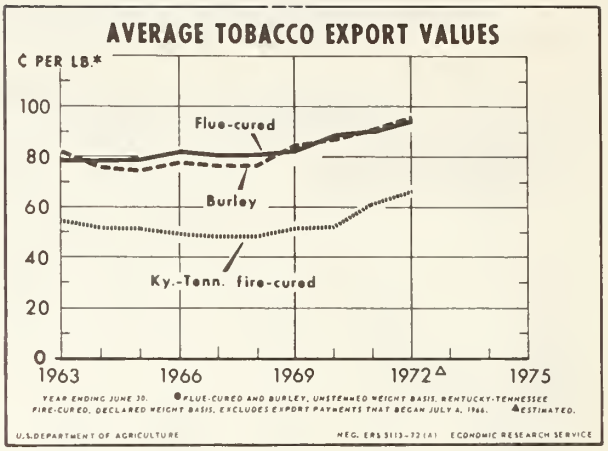
Compiled from publications and records of the Bureau of the Census.

Decreased exports of flue-cured tobacco, the principal export class, accounted for most of the July-April decrease. Shipments of burley, fire-cured, Maryland, and cigar wrapper were up. Much of the July-April decrease occurred in exports to the United Kingdom, where manufacturers anticipated low-cost tobacco from Rhodesia (formerly a major U.K. supplier) or associated members of the European Community. Most other European countries took less, but larger shipments went to Japan, Italy, Denmark, and South Vietnam.

Economic prospects for Europe and other U.S. markets continue favorable but the enlarged EC and the development of its tobacco CAP have hurt our long-range export prospects. Assuming that the U.N. sanctions continue moderately effective against Rhodesia's sizable tobacco stocks, U.S. exports in July-December 1972 may equal the 1966-71 average of 311 million pounds for those months.

Imports Continue to Pick Up

U.S. tobacco imports for consumption (factory use of imports) during January-April 1972 were about 12 percent higher than the high level of a year earlier (table 6). Cigarette tobacco imports gained 10 percent to accommodate the gain in cigarette output. Turkey



remains our leading supplier. Cigar tobacco imports also increased.

January-April 1972 arrivals of tobacco (general imports) totaled 133 million pounds, 47 million more than in January-April 1971. With last year's dock strike ending, the shipping pace for cigarette tobaccos picked up. So stocks got a sizable boost from the January low. Still, by April 1 this year, stocks of foreign-grown cigarette and smoking tobacco in the United States were 2 percent below a year earlier. The total of 377 million pounds (farm-sales weight) was smallest for that date since 1966.

TOBACCO LEAF SITUATION AND OUTLOOK[1]

Pesticide Residue Developments

USDA announced on May 15 a policy of spot checking tobacco for pesticide residues. USDA will random sample the 1972 tobacco crop on all markets and will chemically analyze the samples for DDT and TDE residues. To receive price support, growers must certify again this season that they did not use DDT or TDE pesticides. The law provides penalties for false certification.

During the past 2 years practically all producers certified they did not use DDT or TDE on tobacco after it was set. Pesticide residues fell substantially. But analyses of the 1971 crop found residue in some samples.

Even in very small amounts, pesticide residues are a major threat to the market acceptability of U.S. tobacco, especially that intended for export. West Germany has set near-zero tolerances for DDT and TDE residues in food and tobacco products effective next January 1. This may also become applicable to the entire European Community, including Great Britain, Denmark, Norway, and Ireland when they become full-fledged Common Market members.

1972 Crop Prospects

A cool, wet spring slowed plant bed development and field work over most of the burley belt, but by mid-June setting was near normal. Flue-cured conditions were near ideal in Georgia and Florida. After the first week of June, warm weather cleared tobacco bluemold out of most North Carolina areas. By mid-June tobacco setting was completed in North Carolina and Virginia. Shade-grown tobacco harvest in Georgia and Florida was progressing normally and flue-cured harvest was starting.

Auctions for the 1972 flue-cured crop are expected to begin the second half of July, after the industrywide Flue-cured Tobacco Marketing Committee works out marketing schedules. Opening dates depend somewhat on the maturity of the crop. Last year auctions for both type 14 (Ga.-Fla.) and type 13 (S.C.-N.C.) opened August 3,the latest opening date in 30 years.

Development of the new crop will be an important influence on prices received by farmers when the 1972

[1] All quantities in this section are stated in farm-sales weight equivalent unless otherwise noted.

auction season opens. With a smaller flue-cured crop this season than last, domestic manufacturers and exporters may buy at auction close to 95 percent of the crop just as they bought last year. Prices are expected to average a little above last year's, due to the 5 percent higher support level (table 7).

On July 12, USDA's Crop Reporting Board will release its first forecast for 1972 flue-cured tobacco production, together with the acreage for harvest and the indicated yield. Subsequent monthly reports, beginning August 10, will also cover burley and other kinds.

Flue-cured

Trade Stocks Pick Up

April 1 stocks of flue-cured tobacco (types 11-14) reported by the Agricultural Marketing Service totaled 2,158 million pounds, 3 percent less than a year earlier. CCC loan stocks fell one-fifth to 646 million pounds, but privately held stocks (manufacturers and dealers) increased 6 percent; this contrasted with a downtrend during 1965-71 (table 8).

Total disappearance during July 1971-March 1972 was 894 million pounds, 22 million lower than in the same period of 1970/71. Domestic disappearance was off 1 percent to 493 million pounds, and exports were down 4 percent. Cigarette production held its own so manufacturers are apparently still reducing the flue-cured proportion in cigarettes.

Exports Rally

Following last year's dock strike and with the threat of a tieup in March, flue-cured exports surged ahead in January and February making up part of an earlier deficit. March and April shipments fell back sharply. For the 10 months through April, U.S. flue-cured exports totaled 417 million pounds, still down 10 percent.

The United Kingdom reduced takings to 94 million pounds in July-April, but remains the leading destination for U.S. flue-cured tobacco. This volume was one-fourth below a year earlier. U.K. cigarette sales have not entirely recovered from the publicity surrounding last year's smoking and health report. Also, manufacturers continue to take a larger share of lower-cost imports from other sources to offset rising U.S. prices and in anticipation of eventual harmonization of tobacco taxes throughout the European Community (table 10).

West Germany is taking substantially less U.S. tobacco. In September a sizable boost in West Germany's cigarette tax goes into effect. Japan, our third ranking market, has taken considerably more U.S. tobacco this marketing year. Japan's cigarette sales are going up about 5 percent annually.

Disappearance Down

Disappearance of flue-cured tobacco in the 1971/72 marketing year ending June 30 is about 4 percent below the 1,174 million pounds used in 1970/71 (table 9) and 7 percent below the 1965-69 marketing year average.

Domestic use probably totals 2 percent below last year and the lowest since 1943/44. Exports may be 10 percent lower. These prospects bring total disappearance down to 1,110 million pounds, still in excess of the last season's marketings. Carryover drops to 1,943 million pounds, down 2 percent from a year earlier and one-fourth below the 1965 record.

As of June 30, flue-cured loan stocks are sharply below last year. During July 1971-May 1972, about 217 million pounds were sold, double a year earlier, and the largest volume since 1966/67. Unsold government loan stocks on May 31, 1972, totaled 584 million pounds, compared with 748 million a year earlier. The record was 960 million pounds on January 1, 1965.

Table 7.—Flue-cured tobacco: Marketing quota and marketings, 1965-72

Year	Quota		Marketings				Net Carryover[2]
	Basic	Effective	Actual	Over-quota	Under-quota	Effective under-quota[1]	
	Million pounds	*Million pounds*	*Million pounds*	*Million pounds*	*Million pounds*	*Million pounds*	*Million pounds*
1965	1,126.0	1,124.4	1,055.5	27.1	96.0	96.0	68.8
1966	1,126.0	1,199.0	1,107.9	35.0	126.1	126.1	91.1
1967	1,126.0	1,202.4	1,247.5	77.9	32.8	30.8	-47.1
1968	1,126.5	1,067.9	996.3	26.5	98.1	96.6	70.0
1969	1,127.1	1,187.0	1,052.1	26.6	161.5	157.9	131.3
1970	1,071.0	1,190.8	1,178.2	65.1	77.6	71.2	6.1
1971	1,071.4	1,076.4	1,076.3	60.4	53.9	49.9	-10.5
1972	1,071.2	1,060.7					

[1] Under quota marketings less ineligible carryover, [2] Effective under quota marketings less over quota marketings.

Compiled from records of Tobacco Division, ASCS.

Table 8.--Tobacco stocks: Flue-cured and burley, beginning of marketing year or month, 1965-72

(Farm-sales weight)

Year 1/ and month	Flue-cured			Burley		
	Held by trade	Under loan	Total 2/	Held by trade	Under loan	Total 2/
	Million pounds					
1965	1,637	919	2,555	1,099	316	1,416
1966	1,602	836	2,439	1,133	262	1,395
1967	1,587	685	2,273	1,105	277	1,382
1968	1,528	773	2,302	1,002	322	1,324
1969	1,300	800	2,100	976	341	1,317
1970	1,228	745	1,972	888	455	1,343
1971	1,214	762	1,976	882	463	1,346
1971:						
January	1,657	847	2,504	1,168	486	1,654
April	1,432	802	2,234	1,143	485	1,628
July	1,214	762	1,976	1,019	469	1,488
October	1,538	776	2,314	882	463	1,346
1972:						
January	1,793	719	2,512	1,159	406	1,565
April	1,512	646	2,158	1,190	344	1,534

1/ July 1 for flue-cured and October 1 burley.

2/ Based on unrounded data.

Table 9.—Flue-cured tobacco, types 11-14, and burley tobacco, type 31: Acreage, yield, production, carryover, supply, supply, disappearance, season average price, and price support operations, 1962-72

(Farm-sales weight)

Marketing year	Acreage harvested	Yield per acre	Production	Beginning stocks[1]			Total supply
				Manufacturers and other	Under loan	Total	
	Thousand acres	*Pounds*	*Pounds*	*Million pounds*	*Million pounds*	*Million pounds*	*Million pounds*
				Flued-cured, types 11-14			
1962	729.8	1,930	1,408.4	1.704.1	377.0	2.081.1	3,489.5
1963	694.5	1,975	1,371.5	1,785.3	496.3	2,281.6	3,653.1
1964	627.6	2,211	1,387.8	1,689.5	696.9	2,386.4	3,774.2
1965	562.3	1,883	1,059.0	1,636.9	918.5	2,555.4	3.614.4
1966	607.0	1,825	1,107.9	1,602.5	836.4	2.438.9	3,546.8
1967	610.3	2,070	[2] 1,250.0	1,587.1	685.4	2,272.5	3,522.5
1968	533.0	1,841	[2] 9.995.6	1,528.1	773.4	2,301.5	3,297.1
1969	576.8	1,825	1,052.8	1,299.6	800.5	2,100.1	3,152.9
1970	584.1	2,042	[2] 1,178.1	1,227.5	744.9	1,972.4	3,150.5
1971[3]	525.8	2,050	[2] 1,076.3	1,214.5	761.9	1,976.4	3,052.7
1972[4]	519.6	2,000	1,039.0	1,322.7	620.0	1,942.7	2,981.7
				Burley, type 31			
1962	338.6	1,993	674.9	1,104.2	33.2	1,137.4	1,812.3
1963	338.5	2,231	755.1	1,133.5	94.4	1,227.9	1,983.0
1964	306.6	2,022	619.8	1,146.8	265.4	1,412.2	2,032.0
1965	277.1	2,116	586.3	1,099.3	316.4	1,415.7	2,002.0
1966	240.7	2,437	586.7	1,133.4	261.9	1,395.3	1,982.0
1967	237.7	2,274	540.6	1,104.8	276.7	1,381.5	1,922.1
1968	237.6	2,372	563.4	1,002.4	321.7	1,324.1	1,887.5
1969	237.7	2,488	591.4	975.7	340.8	1,316.5	1,907.9
1970	216.4	2,590	560.5	887.9	454.8	1,342.7	1,903.2
1971[3]	213.5	2,213	472.6	882.4	463.4	1,345.8	1,818.4
1972[4]	227.6	2,500	569.0	928.4	320.0	1,248.4	1,817.4

Marketing year	Disappearance			Average price per pound	Price level	Placed under Government loan	
	Total	Domestic	Exports			Quantity	Percentage of crop
	Million pounds	*Million pounds*	*Million pounds*	*Cents*	*Cents*	*Million pounds*	*Percent*
				Flue-cured, types 11-14			
1962	1,207.9	777.0	430.9	60.1	56.1	237.2	16.8
1963	1,266.7	768.3	498.4	58.0	56.6	277.2	20.2
1964	1,218.8	774.7	444.1	58.5	57.2	285.6	20.7
1965	1,175.5	752.4	423.1	64.6	57.7	71.5	6.8
1966	1,274.3	687.2	587.1	66.9	58.8	74.6	6.8
1967	1,221.0	687.7	533.3	64.2	59.9	282.1	22.6
1968	1,197.0	671.7	525.3	66.6	61.6	128.8	12.9
1969	1,180.5	645.9	534.6	72.4	63.8	97.6	9.3
1970	1,174.1	640.1	534.0	72.0	66.6	144.2	12.2
1971	[4] 1,110.0	[4] 630.0	[4] 480.0	77.2	69.4	55.7	5.2
1972					72.7		
				Burley, type 31			
1962	584.4	530.9	53.5	58.6	57.8	63.5	9.4
1963	570.8	513.4	57.4	59.2	58.3	202.3	26.8
1964	616.3	560.6	55.7	60.3	58.9	110.4	17.8
1965	606.7	549.6	57.1	67.0	59.5	42.2	7.2
1966	600.5	544.1	56.4	66.9	60.6	62.5	10.6
1967	598.0	544.6	53.4	71.8	61.8	64.2	11.9
1968	571.0	516.1	54.9	73.7	63.5	56.2	10.0
1969	565.2	507.1	58.1	69.6	65.8	158.5	26.8
1970	557.4	503.0	54.4	72.2	68.6	47.7	8.5
1971	[4] 570.0	[4] 510.0	[4] 60.0	80.9	71.5	.2	([5])
1972					74.9		

[1] July for flue-cured; October 1 for burley. [2] Sales. [3] Subject to revision. [4] Estimated; production is based on intended acreage and projected yield. [5] Less than, 05. percent.

Table 10.--United States exports of unmanufactured tobacco by types, to principal importing countries, crop years, 1970/71-1971/72 1/

(Declared weight)

Importing country	1970-1971	Part year through April 2/ 1970-1971	Part year through April 2/ 1971-1972	Importing country	1970-1971	Part year through April 2/ 1970-1971	Part year through April 2/ 1971-1972
	Million pounds				Thousand pounds		
	Flue-cured, types 11-14				Va. fire and sun-cured, 21, 37		
United Kingdom	95.1	87.8	65.6	Sweden	626	467	445
West Germany	89.0	67.3	52.5	Norway	2,105	1,211	450
Japan	41.2	41.2	45.0	Other countries	1,235	303	412
Netherlands	15.6	12.2	11.9				
Thailand	21.4	21.4	19.8	Total	3,966	1,981	1,307
Australia	10.4	8.7	8.0				
Italy	9.8	3.8	4.3				
Sweden	9.8	8.5	7.3		One Sucker, type 35		
Norway	2.9	2.6	2.3				
Finland	3.8	3.4	3.1	Belgium	216	197	0
Denmark	11.2	9.3	12.8	New Guinea	135	97	0
Ireland	9.3	8.2	6.9	Other countries	291	150	101
Belgium	11.0	10.0	7.2	Total	642	444	101
Switzerland	9.0	8.5	4.8				
S. Vietnam	11.9	8.7	11.0				
France	3.6	3.5	1.5		Green River, type 36		
Spain	5.1	4.2	4.1				
Malaysia	8.7	7.2	7.1	United Kingdom	108	41	70
Taiwan	9.5	9.5	13.3	West Germany	118	118	0
New Zealand	3.7	3.1	2.1	Congo (Kinshasa)	74	36	12
Other countries	32.6	26.8	24.5	Other countries	123	51	60
Total	414.5	356.0	315.1	Total	423	246	142
	Burley, type 31				Cigar Filler, types 41-44		
Italy	5.4	.3	2.9	France	90	0	200
Sweden	4.9	3.3	1.5	New Zealand	85	47	38
Denmark	2.4	1.4	1.9	Other countries	24	2	0
Netherlands	1.4	.4	.5	Total	200	49	238
France	1.3	.6	.3				
West Germany	12.7	4.4	3.4				
Switzerland	2.8	1.7	1.1		Conn. Binder, types 51-52		
Finland	1.2	.8	.7				
Thailand	1.8	.8	.9	West Germany	88	88	18
Philippine Republic	1.9	.2	1.7	Canada	32	25	24
Other countries	8.3	3.4	5.3	Canary Islands	86	22	0
Total	44.1	17.3	20.3	Other countries	102	92	10
				Total	244	227	52
	Maryland, type 32						
					Wis. Binder, types 54-55		
Belgium	1.5	.5	.5				
West Germany	1.7	.5	1.1	Netherlands	56	56	0
Switzerland	6.9	3.5	2.1	Other countries	6	0	1
Other countries	1.3	.3	.1	Total	62	56	1
Total	11.4	4.8	3.8				
					Cigar Wrapper, types 61-62		
	Ky.-Tenn. fire-cured, 22-23						
				Canada	441	358	278
Sweden	.2	.2	.6	United Kingdom	248	245	1,117
Netherlands	12.5	5.1	2.8	West Germany	374	151	353
Belgium	1.5	1.1	.2	Australia	68	68	24
France	2.8	1.2	3.5	Canary Islands	80	79	75
Switzerland	.9	.6	.9	Other countries	461	220	648
Other countries	6.7	3.6	1.7	Total	1,672	1,121	2,495
Total	24.6	11.8	9.7				
					Black Fat		
	Stems, Trimmings, and Scrap						
				Cameroon	510	216	322
Sweden	5.2	2.4	1.1	Bahamas	47	29	24
Denmark	3.3	1.7	2.1	Togo	457	324	316
United Kingdom	14.8	10.2	12.0	Nigeria	575	514	248
West Germany	6.8	3.4	2.8	Western Africa, n.e.c.	914	374	756
Other countries	39.3	26.5	27.2	Other countries	137	95	56
Total	69.4	44.2	45.3	Total	2,640	1,552	1,722

1/ July-June crop year for flue-cured and cigar wrapper; October-September for all other types. 2/ Subject to revision. Detail may not add to total due to rounding.
Compiled from publications and records of the Bureau of the Census.

Tobacco loan stocks, 1970-72

(Farm-sales weight)

Type	End of May		
	1970	1971	1972
	Million pounds	*Million pounds*	*Million pounds*
Flue-cured, 11-14	770.2	790.7	633.9
Uncommitted	717.6	747.8	584.1
Burley, 31	475.5	482.3	349.6
Uncommitted	462.6	471.5	314.3
Virginia, 21	1.5	1.1	.6
Kentucky-Tennessee, 22-23	12.4	8.1	2.1
Kentucky-Tennessee, 35-36	19.4	18.0	13.6
Ohio, 42-44	.1		0
Puerto Rican, 46	3.3	6.1	3.8
Conneticut Valley, 51-52	2.1	2.4	2.1
Total	1,284.5	1,308.7	1,005.7

Compiled from records of Tobacco Division, ASCS.

1972 Flue-cured Acreage Declines

Despite record prices for last year's flue-cured crop, growers are expected to set about 1 percent less acreage in 1972. This indicates harvested acreage will again fall short of allotted acreage. In North Carolina, the principal production area, daily farm wages this spring averaged 7 percent over 1971 and the farm work force was down 2 percent.

The 1972 effective flue-cured acreage allotment, reflecting last year's net overmarketings, is about 576,000 acres, and the effective poundage allotment is about 1,061 million pounds, down 1 percent from last year. In 1971, growers leased 27 percent of the poundage quota from other allotment owners; the proportion is expected to increase further this year.

If farmers carry out their March 1 intentions, they will harvest about 520,000 acres this year. Assuming a normal growing season and yields, modified by the acreage-poundage program, the crop computes out to about 1.04 billion pounds. Production at this level, plus the prospective carryover, would give a total 1972/73 supply 3 percent below the 3.05 billion pounds in 1971/72.

1972 Price Support Details

USDA announced on June 2 the 1972 loan rates for the various grades. Rates range from 47 cents to 98 cents a pound for untied leaf, reflecting the national average support level of 72.7 cents a pound. This is about 4.8 percent above 1971. Grade price supports increased 2 to 7 cents per pound over 1971 levels. Of the 155 grades, 50 were increased 2 cents per pound, 29 went up 3 cents, and 30 went up 4 cents. The largest increases were on nondescript and lower-value leaf grades, which in recent markets sold for prices well above the loan rate. For the first time price supports on tied tobacco will be the same as for untied tobacco of like grade.

As in the past, no price support will be offered in 1972 on any tobacco graded N2 (Nondescript 2) No-G (No Grade) U (Unsound) W (Doubtful keeping order) or scrap. Marketing of such tobacco, however, will be charged against individual farm quotas to discourage the marketing of these grades.

Public Law 92-311, approved June 6, authorizes the lease and transfer of flue-cured tobacco marketing quotas between farms within the same county during the marketing season. However, any lease from a farm with a quota in excess of 2,000 pounds filed on or after June 15 is not effective unless both the lessor and lessee planted at least 50 percent of their respective farm acreage allotment. This law gives flue-cured tobacco farmers more flexibility in their farming operations, especially when favorable weather conditions bring production in excess of their quotas. Previous legislation set normal planting time as the deadline for each season's leasing activity.

Burley

First Half Use Rose

Both exports and domestic use of burley increased in the first half of the marketing year (October-March). At 284 million pounds, disappearance was 9 million pounds above a year earlier. Domestic use totaled 259 million pounds, up 4 million. At the same time, cigarette output edged upward.

For the first 7 months of this marketing year, burley exports totaled 26 million pounds—4 million above a year earlier. Italy and Japan accounted for most of the gain. West Germany, the leading destination, took less. Burley exports averaged $1.01 per pound this past July-April, compared with 94.5 cents in 1970/71 (unstemmed leaf basis).

Carryover Declining

April 1 stocks of burley totaled 1,534 million pounds, 6 percent below a year earlier. By May 31, government loan stocks were about 30 percent smaller than the 482 million pounds of a year earlier. A smaller crop available this season for manufacturers, exporters, and dealers gave loan associations an opportunity to sell substantially more old-crop tobacco. With the rise in cigarette production, domestic utilization of burley tobacco this season may exceed the 503 million pounds in 1970/71. Exports may exceed both last year's level and the previous record of 58 million pounds in 1969/70. Based on these prospects, disappearance would climb 3 percent above the 557 million pounds of last season. This would leave an October 1 carryover about 8 percent below a year earlier.

March intentions indicated farmers would set about 6 percent more burley acreage than last year. Assuming an average yield, production on the intended acreage would total 569 million pounds, about one-fifth more than last

year's weather-reduced crop. Indicated carryover plus the projected crop would result in a 1972/73 supply about the same as this year's 1.82 billion pounds.

Since the projected crop is considerably below the quota of 612 million pounds, burley growers may have altered their plans and may market a crop about equal to the quota. For example, flue-cured growers have sold under an acreage-poundage program for 7 years, with overquota and underquota marketings about equal.

Last year 18,874 burley allotment holders leased out 15.3 million pounds. Leasing was first authorized by last year's burley legislation. Growers can lease throughout the production and marketing season, but most of the 1971 leasing occurred during the marketing season.

Maryland

Brisk Demand Boosts Prices

A strong demand prevailed for Maryland tobacco (type 32) again this season and auction prices attained another record high. Quality of offerings eased downward from last year but almost all grade prices were higher. The 1971 crop was about 1 percent larger than the previous year's outturn. Auction sales began April 18 and were scheduled to end June 23. Through June 16 this year market receipts totaled about 88 percent of the estimated 1971 crop. Comparative data for the same period in 1971 are:

Maryland auction sales

Year	Net sales	Average price
	Million pounds	*Cents/ pounds*
1971	26.3	78.9
1972	26.3	82.1

Maryland tobacco goes almost entirely into cigarettes. Beginning with the 1966 crop when growers did not approve marketing quotas, Maryland tobacco has not been eligible for government price support. Since 1966, Maryland supplies have dropped about 40 percent. Disappearance during the first half of the marketing year (October 1971-March 1972) was 12 million pounds—about 8 million below a year earlier. Almost all the decline occurred domestically, as U.S. manufacturers adjusted disappearance rate to declining supplies.

In the first 7 months of the current marketing year exports were 1 million pounds below the low level of a year earlier and averaged about 2½ million pounds below the same period in the 3 previous years. Last fall's dock strike came at the beginning of the marketing year. Switzerland, the principal export outlet, accounted for most of the decline. Maryland tobacco accounted for about 8 percent of total Swiss tobacco imports in 1971.

Carryover to Decline Again

For the 1971/72 season ending in September, disappearance of Maryland tobacco is expected to fall substantially short of last season's 40 million pounds (table 11). Both domestic use and exports are declining as supplies have fallen and prices risen. Carryover next January 1 may decline 3 million pounds from this year because disappearance exceeds production.

Based on farmers' March acreage intentions and average yield, the 1972 Maryland crop would decline about 2 percent below the 1971 crop. The 1972/73 supply would be about 5 percent below the 76 million pounds for this season and the lowest since 1945/46.

Fire—cured

Disappearance May Drop

Disappearance of fire-cured tobacco (types 21-23) during the first half of the marketing year that began October 1, 1971, was 23 million pounds—about the same as a year earlier. Domestic use gained, while exports slipped. For the year, 4 percent less disappearance is expected. Still it would exceed last year's output by about 3 million pounds. Carryover stocks this October would fall about 5 percent from last October's (table 12).

Due to the record-high average price in the 1971/72 markets, fire-cured growers may expand acreage again this year. An increase is expected in the Kentucky-Tennessee area, according to March 1 planting intentions. On intended acreage with an average yield adjusted for trend, growers would produce a crop of about 47 million pounds, nearly 8 percent larger than in 1971, and about one-seventh above the 1966-70 average. The 1972/73 supply is indicated about the same as this season.

Based on the past decade's trends, domestic use of the Virginia type may not change much this season from 1970/71. But domestic use of the much larger-volume Kentucky-Tennessee types may increase, partly recovering a sizable decline last season.

Exports of fire-cured tobacco in 1971/72 may decline from last season due to the dock strike at the start of this crop year. Exports of 10.6 million pounds for types 22-23 during October 1971-April 1972 were 2 million below a year earlier. The Netherlands—usually the leading outlet—decreased its takings 2 million pounds, and the shortfall may widen further in succeeding months. Exports to France, the second-ranked outlet, already exceed last season's total.

Virginia fire-cured exports of 1.6 million pounds in October 1971-April 1972 were 0.8 million below a year earlier. Exports to Norway, the leading destination, were down. In Malawi, another major fire-cured exporter, the 1972 crop is expected to reach 28.5 million pounds, up from 26.2 million last year.

Dark Air—cured

Supplies Declining

Total disappearance of dark air-cured tobacco (types 35-37) during the first half of the current marketing year

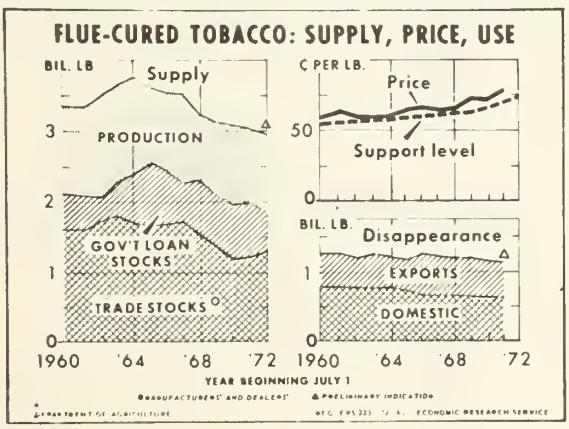
Table 11.--Maryland tobacco, type 32: Acreage, yield, production, carryover, supply, disappearance, season average price, and price support operations, 1967-72

(Farm-sales weight)

Marketing year	Acreage harvested	Yield per acre	Production	Stocks, following January 1 --			Total supply
				Manufacturers and other	Under loan	Total	
	Thousand acres	Pounds	Million pounds				
1967	31.5	1,030	32.4	68.2	18.1	86.3	118.7
1968	30.0	1,065	32.0	74.5	7.0	81.5	113.5
1969	28.0	1,000	28.0	66.7	0	66.7	94.7
1970	27.0	1,090	29.4	50.1	0	50.1	79.5
1971	28.0	1,060	29.7	46.0	0	46.0	75.7
1972 1/	27.0	1,074	*29.0			*43.0	*72.0

Marketing year	Disappearance 2/			Average price per pound	Price support level	Placed under Government loan	
	Total	Domestic	Exports			Quantity	Percentage of crop
	Million pounds			Cents		Million pounds	Percent
1967	36.0	20.3	15.7	62.4	No price support		
1968	48.7	38.3	10.4	69.8	No price support		
1969	41.3	29.1	12.2	75.1	No price support		
1970	39.5	27.6	11.9	78.6	No price support		
1971	*30.0	*20.0	*10.0	*82.1	No price support		
1972					No price support		

1/ Subject to revision. 2/ Year beginning October 1. * Estimated; production based on intended acreage and projected yield; price is auction market average through June 16.



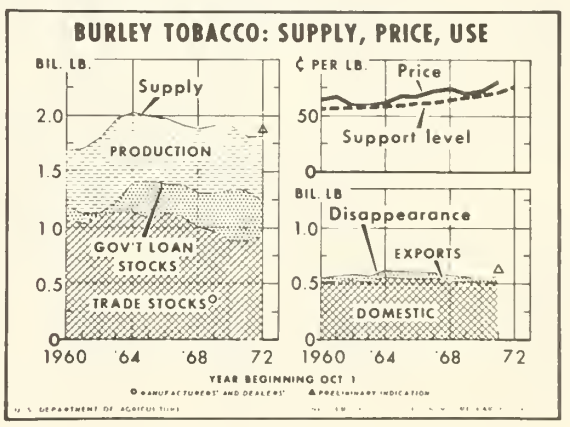


Table 12.--Fire-cured tobacco, Kentucky-Tennessee types 22-23, and Virginia fire-cured type 21: Acreage, yield, production, carryover, supply, disappearance, season average price, and price support operations, 1967-72

(Farm-sales weight)

Marketing year beginning October 1	Acreage harvested	Yield per acre	Production	Beginning stocks, October 1 -- Manufacturers and other	Beginning stocks, October 1 -- Under loan	Beginning stocks, October 1 -- Total	Total supply
	Thousand acres	Pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Kentucky-Tennessee fire-cured, types 22-23							
1967	17.3	1,702	29.5	64.0	27.3	91.3	120.8
1968	17.9	1,822	32.6	57.3	21.5	78.8	111.4
1969	19.0	1,797	34.1	61.1	11.6	72.7	106.8
1970	17.7	1,749	30.9	54.1	9.7	63.8	94.7
1971	19.5	1,928	37.6	48.6	4.7	53.3	90.9
1972 1/	21.6	1,898	*41.0			*50.9	*91.9
Virginia fire-cured, type 21							
1967	5.4	1,290	7.0	12.1	2.7	14.8	21.8
1968	4.9	1,205	5.9	8.9	2.8	11.7	17.6
1969	5.0	1,340	6.7	8.0	1.9	9.9	16.6
1970	5.0	1,230	6.2	8.4	1.4	9.8	16.0
1971	5.0	1,180	5.9	8.0	1.0	9.0	14.9
1972 1/	5.0	1,200	*6.0			*8.4	*14.4

Marketing year beginning October 1	Disappearance: Total	Disappearance: Domestic	Disappearance: Exports	Average price per pound	Price support level	Placed under Government loan: Quantity	Placed under Government loan: Percentage of crop
	Million pounds			Cents		Million pounds	Percent
Kentucky-Tennessee fire-cured, types 22-23							
1967	42.0	14.9	27.1	46.2	41.9	.3	2.7
1968	38.7	2/19.1	19.6	51.1	43.1	.4	1.2
1969	43.0	18.5	24.5	48.1	44.6	1.9	5.6
1970	41.4	13.1	28.3	54.4	56.6	3/	.1
1971	*40.0	*15.0	*25.0	60.8	48.5	3/	.1
1972					50.8		
Virginia fire-cured, type 21							
1967	10.1	3.4	6.7	40.9	41.9	.7	10.1
1968	7.7	3.0	4.7	46.9	43.1	.2	3.4
1969	6.8	1.7	5.1	53.1	44.6	.1	1.5
1970	7.0	2.4	4.6	52.0	46.6	.1	2.0
1971	*6.5	*2.4	*4.1	54.8	48.5	.1	1.0
1972					50.8		

1/ Based on March 1 prospective plantings and average yield with allowance for trend and estimated stocks. 2/ Includes 4.7 million pounds fire loss, April 1969. 3/ Less than 50,000 pounds. * Estimated.

was 11.4 million pounds, 0.9 million above a year earlier. Domestic disappearance gained after a big drop last year. For the year ending September 30, 1972, total disappearance may rise slightly. Disappearance is expected to exceed last year's production, reducing carryover again (table 13).

About the same acreage and production as in 1971 are projected for this season. But with carryin stocks likely lower, the 1972/73 supply would total slightly below the 70 million pounds in 1971/72.

Domestic disappearance of dark air-cured tobacco follows a cyclical pattern, so in the year ending in September disappearance may rise from the low level of last year. In the first half of the current marketing year, there was less manufacture of plug, twist and fine-cut chewing tobacco—major domestic outlets for these types. Exports of dark air- and sun-cured tobacco, which normally account for one-fifth of use, are declining in the 1971/72 crop year.

Exports of Black Fat tobacco, a semiprocessed product of mostly dark fire-cured and air-cured leaf, increased in October 1971-April 1972 from the year-earlier level of 1.6 million pounds. Exports of One Sucker and Green River leaf were down 500,000 pounds.

Cigar Tobacco

1972 Prospects

Supplies of domestic-grown cigar tobacco are smaller again this year, due to lower carryover stocks. Production is expected to be about the same in 1972/73 as last season. The decline in cigar production has stopped the uptrend in imports.

By April 1, holdings of U.S. and Puerto Rican cigar tobacco (types 41-62) totaled 189 million pounds, a decline of 24 million from a year earlier. The decrease was in the filler and wrapper types; binder types were up slightly. Foreign-grown cigar tobacco stocks in the United States on April 1 were 17 million pounds below a year earlier. Stocks from nearly all origins, including the Philippines, declined.

During October 1971-April 1972, manufacturers used about 52 million pounds of imported cigar tobacco—slightly below a year earlier. Less came from the Philippines, the leading supplier.

U.S. cigar tobacco acreage may gain a little in 1972, reversing the long downtrend. The increase would occur in cigar filler and binder types. Wrapper acreage may be unchanged. Again this year, USDA transferred filler and binder allotments (types 42-44 and 53-55) to growers who wanted to increase their 1972 plantings. Under terms of this annual reallocation USDA transferred the allotments from growers who did not wish to use their allotments this year. The reallocation consisted of 1,464 acres in Wisconsin and 1,024 acres in Ohio.

Filler Supply Lower, Disappearance Steady

For the first half of the current marketing year (October-March) disappearance of cigar filler tobacco was 31 million pounds—2½ million above a year earlier. Ohio and Puerto Rican filler use dropped, but Pennsylvania filler rose. During October 1971-April 1972, filler—export a relatively small part of total disappearance—increased to 266,000 pounds, compared with 55,000 pounds of a year earlier. France accounted for the gain.

Based on historical trends and 1971/72 part-year data, total disappearance of Pennsylvania filler may not change much from 1970/71. Disappearance of Puerto Rican tobacco may decline further in 1971/72. Since filler disappearance is expected to surpass production by about 19 million pounds, carryover on October 1 may total around 91 million pounds, lowest on record (table 14).

Foreign-grown cigar leaf tobacco: U.S. imports and stocks,

(Farm-salesweight)

Country of Origin	Imports for consumption				Dealers and manufacturers stocks, April 1—			
	October-September 1970-71	October-April			1969	1970	1971	1972
		1969-1970	1970-1971	1971-1972				
	Million pounds	*Million pounds*	*Million pounds*	*Million pounds*	*Million pounds*	*Million pounds*	*Million pounds*	*Million pounds*
Philippines ..	46.7	22.7	21.7	16.1	42.9	42.1	45.0	32.4
Dominican Republic ..	13.3	7.0	6.9	6.4	14.3	11.5	13.3	12.7
Brazil	6.4	4.3	3.2	5.6	8.9	8.0	7.3	6.3
Colombia ...	7.5	4.9	3.8	5.3	7.4	9.4	6.8	6.8
Paraguay	2.8	2.9	1.5	2.4	4.2	10.9	8.1	5.5
Mexico	5.0	2.0	2.3	3.9	3.5	4.6	6.0	6.1
Indonesia ...	4.0	1.4	2.6	1.4	3.0	2.8	3.5	4.4
All others ...	21.9	7.7	11.6	10.8	9.7	12.8	13.7	12.3
Total	107.6	52.9	53.6	51.9	93.9	102.1	103.7	86.5

Table 13.--Dark air-cured tobacco, types 35-36, and Sun-cured tobacco type 37: Acreage, yield, production, carryover, supply, disappearance, season average price, and price support operations, 1967-72

(Farm-sales weight)

Marketing year beginning October 1	Acreage harvested	Yield per acre	Production	Beginning stocks			Total supply
				Manufacturers and other	Under loan	Total	
	Thousand acres	Pounds	Million pounds				
Dark air-cured, types 35-36							
1967	9.5	1,629	15.5	39.2	21.3	60.5	76.0
1968	9.8	1,831	18.0	41.1	17.1	58.2	76.2
1969	10.1	1,793	18.1	44.1	15.0	59.1	77.2
1970	8.2	1,863	15.4	35.5	18.2	53.7	69.1
1971	8.6	1,834	15.7	35.5	14.3	49.8	65.5
1972 1/	8.6	1,849	*15.9			*45.5	*61.4
Sun-cured, type 37							
1967	1.2	1,090	1.3	4.2	0	4.2	5.5
1968	1.1	1,095	1.2	3.9	0	3.9	5.1
1969	1.1	1,225	1.3	3.8	0	3.8	5.1
1970	1.0	1,100	1.1	3.3	0	3.3	4.4
1971	.9	1,200	1.1	3.1	0	3.1	4.2
1972 1/	.9	1,200	*1.1		0	*3.0	*4.1

	Disappearance			Average price per pound	Price support level	Placed under Government loan	
	Total	Domestic	Exports			Quantity	Percentage of crop
	- - Million pounds - -			Cents		Million pounds	Percent
Dark air-cured, types 35-36							
1967	17.8	14.8	3.0	40.8	37.3	1.4	9.0
1968	17.1	15.0	2.1	47.4	38.3	.7	3.9
1969	23.5	21.2	2.3	40.3	39.7	4.8	26.5
1970	19.3	16.7	2.6	46.0	41.4	1.0	6.8
1971	*20.0	*17.5	*2.5	47.1	43.1	1.7	10.7
1972					45.2		
Sun-cured, type 37							
1967	1.6	1.2	.4	45.2	37.3	2/25	1.9
1968	1.3	1.1	.2	53.2	38.3	2/1	.1
1969	1.8	1.5	.3	52.8	39.7	2/1	.1
1970	1.3	1.1	.2	53.8	41.4	2/3	.3
1971	*1.2	*1.0	*.2	54.1	43.1	0	---
1972					45.2		

1/ Based on March 1 prospective plantings and average yields with allowance for trend and estimated stocks. 2/ Quantity placed under Government loan reported in thousand pounds. * Estimated.

Table 14.--Cigar tobacco, types 41-62: Domestic supplies, disappearance, and season average prices, for 1967-72

(Farm-sales weight)

Crop year	Acreage harvested	Yield per acre	Supply			Disappearance			Average price per pound to growers
			Production	Beginning stocks 1/	Total supply	Total	Domestic	Exports	
	Thous. acres	Pounds	Million pounds						Cents
Pennsylvania Seedleaf Filler (type 41)									
1967	21.0	1,825	38.3	112.3	150.6	41.9	41.3	0.6	28.0
1968	21.0	1,775	37.3	108.7	146.0	40.9	40.0	.9	30.0
1969	20.0	1,875	37.5	105.1	142.6	45.3	44.7	.6	30.0
1970	18.0	1,775	32.0	97.3	129.3	42.3	42.1	.2	31.0
1971	17.0	1,600	27.2	87.0	114.2	*43.0	*42.5	*.5	36.0
1972 2/	17.5	1,795	*31.4	*71.2	*102.6				
Ohio, Miami Valley Filler (types 42-44)									
1967	2.3	1,580	3.6	15.5	19.1	6.2	6.2	---	29.0
1968	2.0	1,670	3.4	12.9	16.3	5.4	5.4	---	31.0
1969	1.7	1,650	2.8	10.9	13.7	4.7	4.7	---	32.5
1970	1.6	1,750	2.9	9.0	11.9	4.1	4.1	---	38.0
1971	1.9	1,750	3.3	7.8	11.1	*3.5	*3.5	---	41.0
1972 2/	2.1	1,715	*3.6	*7.6	*11.2				
Puerto Rico Filler (type 46) 3/									
1967	7.6	1,419	10.8	40.5	51.3	16.9	16.9	---	4/33.1
1968	6.0	1,282	7.6	34.4	42.0	16.2	16.2	---	4/33.3
1969	4.7	1,303	6.1	25.8	31.9	12.6	12.6	---	4/33.6
1970	3.2	1,397	4.5	19.3	23.8	8.8	8.8	---	4/36.1
1971	3.0	1,350	4.0	15.0	19.0	*6.9	*6.9	---	5/
1972 2/	3.0	1,350	*4.0	*12.1	*16.1				
Total Cigar Filler (types 41-46)									
1967	30.9	1,707	52.7	168.3	221.0	65.0	64.4	.6	29.1
1968	29.0	1,666	48.3	156.3	204.3	62.5	61.6	.9	30.5
1969	26.4	1,759	46.4	141.8	188.2	62.6	62.0	.6	30.6
1970	22.8	1,722	39.4	125.6	165.0	55.2	55.0	.2	32.1
1971	21.9	1,579	34.5	109.8	144.3	*53.4	*52.9	*.5	36.5
1972 2/	22.6	1,728	*39.0	*90.9	*129.9				
Connecticut Valley Binder (types 51-52)									
1967	1.5	1,819	2.7	16.4	19.1	7.9	5.7	2.2	54.5
1968	1.6	1,808	2.8	11.2	14.0	5.1	4.7	.4	59.5
1969	1.6	1,434	2.3	8.9	11.2	4.2	3.9	.3	58.2
1970	1.7	1,756	2.9	7.0	9.9	2.7	2.4	.3	65.5
1971	1.6	1,848	3.0	7.2	10.2	*2.5	*2.4	*.1	65.5
1972 2/	1.6	1,760	*2.8	*7.7	*10.5				
Southern Wisconsin Binder (type 54)									
1967	3.8	1,905	7.2	20.7	27.9	8.0	8.0	---	34.4
1968	3.7	1,990	7.4	19.9	27.3	7.7	7.7	---	36.8
1969	3.7	1,740	6.4	19.6	26.0	9.3	9.3	---	40.2
1970	4.4	2,135	9.4	16.7	26.1	7.3	7.3	---	50.3
1971	5.3	2,270	12.0	18.8	30.8	*11.3	*11.3	---	55.6
1972 2/	5.2	2,150	*11.2	*19.5	*30.7				
Northern Wisconsin Binder (type 55)									
1967	4.5	1,975	8.9	29.3	38.2	9.3	8.9	.4	34.1
1968	4.0	1,670	6.7	28.9	35.6	14.9	14.5	.4	37.9
1969	3.7	1,815	6.7	20.7	27.4	8.8	8.5	.3	43.4
1970	4.4	2,055	9.0	18.6	27.6	9.2	9.1	.1	52.0
1971	5.3	1,980	10.5	18.4	28.9	*10.2	*10.2	---	54.0
1972 2/	5.3	1,885	*10.0	*18.7	*28.7				

See footnotes at end of table.

Continued --

Table 14.--Cigar tobacco, types 41-62: Domestic supplies, disappearance, and season average prices, for 1967-72--Cont.

(Farm-sales weight)

Crop year	Acreage harvested	Yield per acre	Supply			Disappearance			Average price per pound to growers
			Production	Beginning stocks 1/	Total supply	Total	Domestic	Exports	
	Thous. acres	Pounds	Million pounds						Cents
Total Wisconsin Binder (types 54-55)									
1967	8.3	1,943	16.1	50.0	66.1	17.3	16.9	0.4	34.2
1968	7.7	1,824	14.1	48.8	62.9	22.6	22.2	.4	37.3
1969	7.4	1,778	13.1	40.3	53.4	18.1	17.8	.3	41.8
1970	8.8	2,095	18.4	35.3	53.7	16.5	16.4	.1	51.1
1971	10.6	2,125	22.5	37.2	59.7	*21.5	*21.5	---	54.9
1972 2/	10.5	2,016	*21.2	*38.2	*59.4				
Total Cigar Binder (types 51-55)									
1967	9.8	1,924	18.8	66.4	85.2	25.2	22.6	2.6	37.1
1968	9.3	1,821	16.9	60.0	76.9	27.7	26.9	.8	41.0
1969	9.0	1,716	15.4	49.2	64.6	22.3	21.7	.6	44.3
1970	10.5	2,041	21.3	42.3	63.6	19.2	18.8	.4	53.1
1971	12.2	2,089	25.5	44.4	69.9	*24.0	*23.9	*.1	56.1
1972 2/	12.1	1,982	*24.0	*45.9	*69.9				
Connecticut Valley Shade-grown (type 61)									
1967	8.5	1,124	9.6	16.0	25.6	12.9	9.6	3.3	360.0
1968	8.4	1,215	10.2	12.7	22.9	10.8	9.1	1.7	280.0
1969	6.3	1,288	8.1	12.1	20.2	8.0	7.0	1.0	400.0
1970	6.0	1,535	9.3	12.2	21.5	7.6	6.6	1.0	400.0
1971	4.7	1,635	7.7	13.9	21.6	*9.0	*6.5	*2.5	400.0
1972 2/	4.6	1,390	*6.4	*12.6	*19.0				
Georgia-Florida Shade-grown (type 62)									
1967	5.1	1,573	8.0	8.7	16.7	7.9	6.3	1.6	245.0
1968	5.0	1,556	7.9	8.8	16.7	9.2	7.1	2.1	270.0
1969	5.0	1,569	7.8	7.5	15.3	6.1	5.2	.9	280.0
1970	3.6	1,590	5.6	9.2	14.8	6.7	5.8	.9	270.0
1971	3.0	1,582	4.7	8.1	12.8	*6.5	*5.5	*1.0	262.0
1972 2/	3.0	1,510	*4.6	*6.3	*10.9				
Total Shade-grown (types 61-62)									
1967	13.6	1,292	17.6	24.7	42.3	20.8	15.9	4.9	308.0
1968	13.4	1,343	18.1	21.5	39.6	20.0	16.2	3.8	275.7
1969	11.3	1,411	15.9	19.6	35.5	14.1	12.2	1.9	341.3
1970	9.6	1,555	14.9	21.4	36.3	14.3	12.4	1.9	350.9
1971	7.7	1,555	12.4	22.0	34.4	*15.5	*12.0	*3.5	348.0
1972 2/	7.6	1,438	*11.0	*18.9	*29.9				
Grand Total Cigar Tobacco (types 41-62)									
1967	54.3	1,642	89.1	259.4	348.5	111.0	102.9	8.1	85.7
1968	51.7	1,610	83.3	237.5	320.8	110.2	104.7	5.5	85.9
1969	46.7	1,667	77.7	210.6	288.3	99.0	95.9	3.1	96.8
1970	42.9	1,762	75.6	189.3	264.9	88.7	86.2	2.5	101.0
1971	41.8	1,734	72.4	176.2	248.6	*92.9	*88.8	*4.1	93.9
1972 2/	42.3	1,748	*74.0	*155.7	*229.7				

1/ October 1 for types 41-55; July 1 for types 61-62.

2/ Subject to revision.

3/ Puerto Rican planting occurs late in calendar year.

4/ Excludes payment by Puerto Rican Government.

5/ Evaluated at 36.1 cents per pound.

* Estimated, 1972 production based on March 1 acreage intentions and projected yields.

Binder Disappearance Gains

With loose leaf chewing tobacco output advancing, cigar binder disappearance for October 1971-March 1972 advanced 4 million pounds to 12½ million. Wisconsin binder (types 54-55) increased, while Connecticut Valley (types 51-52) declined. Rising price levels virtually preclude exports of either kind.

Disappearance of Connecticut Valley binder tobacco for 1971/72 is estimated below last season's output, so carryover this October 1 may rise to 7.7 million pounds—½ million pounds above the year-earlier level.

Gains in looseleaf chewing tobacco production and manufacturers' preference for Wisconsin tobacco point to use 5 million pounds above last season's 16.5 million. But carryover stocks may still rise slightly above last October's 37 million pounds.

More Wrapper Shipped

Disappearance of shade-grown wrapper (types 61-62) during July 1971-March 1972 was 12.7 million pounds, 2.6 million above a year-earlier. Most of the gain came in exports as domestic use held close to last year's level. Prices to growers held about steady again last season. For the year ending June 30, 1972, cigar wrapper disappearance is expected to exceed the 1971 crop, leaving smaller carryover than a year ago. During the first 10 months of the marketing year, cigar wrapper exports were 2.8 million pounds, 1.5 million above a year earlier. They were boosted by the largest shipments of Connecticut Valley type to the United Kingdom in several years.

1971 Crop Summary

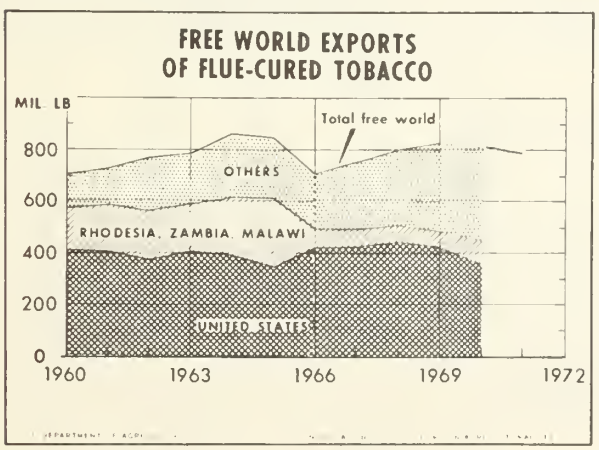
Marketing of the 1971 U.S. cigar tobacco crop was practically completed by April 1972. According to USDA's Crop Reporting Board, the crop totaled 68.4 million pounds, about 4 percent below 1970. Price changes ranged from 8 cents per pound less for Georgia-Florida shade-grown wrapper to 5 cents per pound more for Pennsylvania filler and Southern Wisconsin binder. Last year filler and wrapper acreage and production were below 1970; binder acreage and output gained. Wisconsin binder yields reached a record high last year; they stabilized for cigar wrapper types, but declined for filler types.

The Puerto Rican crop (type 46) was harvested early this year. Acreage was reduced, so production fell to a record low.

WORLD TOBACCO TRADE REVIEW, 1971[2]

Exports Up in 1971

Free world tobacco leaf exports rose 3 percent last year to surpass the 1964 record. Although U.N. sanctions against Rhodesian tobacco continued, increased quantities are apparently moving in world trade. Oriental leaf continued in surplus. Imports of free-world countries increased 8 percent from 1970 to 2,003 million pounds of unmanufactured tobacco. Trade data is not available from Sino-Soviet countries. Because the People's Republic of China ships a sizable quantity of tobacco into Europe and the Far East, free-world imports are larger than exports.



The United States, the world's leading producer and exporter of tobacco, supplied 25 percent of the free-world exports in 1971 compared with 28 percent in 1970 (table 15). U.S. exports during 1971 decreased 7 percent due to the U.S. dock strike and stiffer competition from cheaper tobacco. Last year the United States shipped about 43 percent of the free-world's flue-cured total.

The 10 leading exporting countries accounted for 74 percent of total free-world exports last year, about the same as in 1970 (table 17). In 1955-59 this share averaged 87 percent. Many other countries are attempting to expand tobacco production as a source of valuable export earnings, although their exports sell for one-fourth or one-half of U.S. prices. Among 9 specified countries (Mexico, Argentina, Paraguay, Colombia, South Africa, Taiwan, South Korea, Pakistan, and Thailand) tobacco exports remained the same as the 229 million pounds in 1970. But the total was well above the 100 million pounds in 1960-64.

Import Highlights

Last year the United States ranked third as an importer of cigarette and cigar tobaccos, mainly for

[2] Data summarized from "World Tobacco Exports", Foreign Agriculture Circular FT 3-72, June 1972, available from Foreign Agricultural Service, Room 5918, U.S. Department of Agriculture, Washington, D.C. 20250.

Table 15.--United States and world production and exports of flue-cured and all unmanufactured tobacco, average 1955-64, annual 1965-71

Period	Flue-cured			All tobacco		
	United States	World total	United States as percentage of total	United States 1/	World total	United States as percentage of total
	Million pounds		Percent	Million pounds		Percent
	Production (farm-sales weight)					
Average:						
1955-59	1,208	2,914	41	1,941	8,519	23
1960-64	1,335	3,305	41	2,211	8,898	25
1965	1,059	3,469	31	1,871	9,620	19
1966	1,108	3,531	31	1,899	9,636	20
1967	1,263	3,859	33	1,979	10,368	19
1968	982	3,649	27	1,721	9,833	18
1969	1,053	3,823	28	1,810	9,821	18
1970 2/	1,193	3,940	30	1,912	10,115	19
1971 2/	1,078	3,917	28	1,713	10,015	17
	Exports (unmanufactured, export weight) 3/					
Average:						
1955-59	413	683	60	500	1,434	35
1960-64	397	772	52	497	1,691	30
1965	351	844	42	468	1,815	26
1966	423	710	60	551	1,689	33
1967	427	750	57	572	1,821	31
1968	444	800	56	599	1,801	33
1969	430	833	52	577	1,810	32
1970 2/	368	812	45	510	1,817	28
1971 2/	341	798	43	473	1,880	25

1/Includes Puerto Rico. 2/Subject to revision. 3/Total excludes Sino-Soviet countries.
Foreign data supplied by the Tobacco Division, Foreign Agricultural Service.

Table 16.--Tobacco imports of ranking foreign markets and percentage supplied by the United States, 1968-71

Country	Total tobacco imports 1/				Percentage supplied by the United States			
	1968	1969	1970	1971 2/	1968	1969	1970	1971 2/
	Million pounds				Percent			
West Germany	306	340	270	341	29	32	25	30
United Kingdom	328	305	284	269	50	44	41	36
France	105	98	140	168	7	5	7	5
Netherlands	102	107	121	123	34	30	30	27
Japan	60	73	73	100	59	64	60	54
Belgium-Luxembourg	64	72	72	74	23	22	22	20
Spain	68	69	79	93	9	10	6	8
Switzerland	47	53	87	66	45	45	40	48
Canary Islands	37	39	39	*39	2	1	*1	*1
Italy	13	39	37	37	48	42	38	53
Denmark	41	34	37	33	47	55	65	48
Egypt, Arab Republic of	30	31	*30	*30	*2	*8	*2	*4

1/Unmanufactured tobacco. 2/Subject to revision. *Estimated.
Compiled from reports of Foreign Agricultural Service.

Table 17.—Exports of unmanufactured tabacco from the leading exporting countries, 1968-71

Country	1968	1969	1970	1971
	Mil. lb.	*Mil. lb.*	*Mil. lb.*	*Mil. lb.*
United States	599	577	510	473
Turkey	173	154	162	180
Greece	155	157	143	131
India	115	121	106	122
Brazil	85	106	120	134
Philippine Republic	94	72	84	100
Rhodesia	*57	*50	*70	*80
Dominican Republic	36	38	42	58
Canada	59	66	65	68
Malawi	36	32	38	46
Total 10 countries	1,409	1,373	1,340	1,392
	Ten countries as percentage of world total			
	Percent	*Percent*	*Percent*	*Percent*
	78	77	74	74

*Estimated.

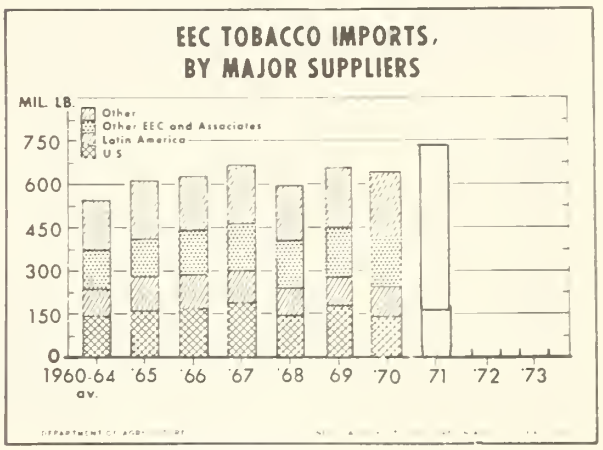
Compiled from reports of Foreign Agricultural Service.

blending with domestic types. West Germany surpassed the United Kingdom to again become the world's leading tobacco importing country. West Germany took more tobacco last year as the industry boomed. But U.K. manufacturers further reduced U.S. tobacco inventories while Parliament considered changes in import policy.

The 12 leading importing countries, excluding the United States, accounted for 68 percent of total free-world imports in 1971 (table 16). Including U.S. imports, the 13 countries accounted for 79 percent. This was a little larger proportion than in 1970.

Last year the United Kingdom imported 269 million pounds of tobacco, 5 percent below 1970. Lower receipts from the United States accounted for almost all the decline; Commonwealth receipts picked up. Gross clearances of tobacco from bond in 1971—an approximate measure of home use and exports combined—fell 5 percent.

West Germany's imports jumped to 341 million pounds, one-fourth above 1970. The United States remained the leading supplier, and increased its share. West German cigarette production set a record high again last year and manufacturers rebuilt inventories. Germany's imports of tobacco from Italy, Turkey, and Poland rose, while imports from Greece declined. Mainland China's imports are no longer reported separately, but from the change in "other countries" category, China apparently supplied about 24 million pounds last year, up 3 million from 1970.



France is the fourth largest tobacco importer, but our share of the market is minor. Latin American sources supplied about 37 percent of the total last year, a little larger percentage than in 1970. Oriental leaf accounted for 27 percent of France's tobacco imports last year, about the same share as in 1970. France began taking tobacco from Italy with the incentive of the EC tobacco CAP.

The Netherlands has no domestic tobacco production and draws from a large number of countries. The U.S. share of the total declined last year, while consignments from South Africa and Mozambique rose to 24 percent.

With rising cigarette production and falling domestic tobacco production, Japan imported a record 100 million pounds of tobacco last year. The United States, the principal supplier, nevertheless saw its share drop again. Last year for the first time Japan took tobacco from Mexico. This year small shipments are coming from Mainland China (table 18 and 19).

FOREIGN NEWS BRIEFS

Foreign Production and Sales

Canada's 1971 flue-cured crop was about 212 million pounds or about the same as the previous year. Auction sales in Ontario (where most of the crop is grown) amounted to 202 million pounds and prices averaged the equivalent of 64 U.S. cents per pound. With a record-high yield, production exceeded the target by 13 percent. Prices averaged about the same as a year earlier, but below the Marketing Board's target price.

For 1972, Canadian manufacturers agreed on a target price of 66.5 Canadian cents per pound if the Ontario crop is less than 210 million pounds. Ontario's acreage quota was increased 7 percent. Frost on June 11 occurred in about one-half the production area. Information has not been received on extent of damage or availability of replacement plants.

In the United Kingdom, a government commission reported in May that a settlement of the

Table 18.—United Kingdom tobacco: Imports, stocks, clearances, and exports, 1969-72

Item	July-March			Item	July-March		
	1969-1970	1970-1971	1971-1972		1969-1970	1970-1971	1971-1972
	Mil. lb.	*Mil. lb.*	*Mil. lb.*		*Mil. lb.*	*Mil. lb.*	*Mil. lb.*
Imports, by source:				Gross clearances:			
United States	128	108	82	Full duty[1]	125	118	112
Commonwealth	80	96	86	Commonwealth rate[2]	99	108	109
Other	29	34	34				
Total	237	238	202	Total	224	226	221
Exports:				Flue-cured:			
Manufactured products	39	36	39	United States	103	94	88
				Canada	35	40	38
				India	33	33	30
Unmanufactured	3	5	5	Zambia and Malawi	9	7	1
				Rhodesia	4	1	1
Stocks, March 31:				Other	19	24	22
Flue-cured	378	360	341				
Other	50	48	53	Total	203	199	188
Total	428	408	394	Net clearances	169	169	166

[1] Equivalent to $13.13 per pound. [2] Equivalent to $12.93 per pound.

Compiled from official United Kingdom sources.

Table 19.—Tobacco EEC imports, by major supplies, 1955-71

Year	United States	Latin America	Other EC and Associates		India, Canada Rhodesia, Zambia, Malawi	Other	Total	U.S. share of total
			Greece and Turkey	Other E C and associated areas				
	Million pounds	*Million pounds*	*Million pounds*	*Million pounds*	*Million pounds*	*Million pounds*	*Million pounds*	*Percent*
Average								
1955-59	119	53	90	41	27	57	387	30.7
1960-64	140	89	86	55	61	109	540	25.9
1965	159	120	84	49	73	126	611	26.0
1966	172	113	101	53	55	132	626	27.5
1967	190	110	99	60	27	178	664	28.6
1968	145	95	97	65	21	170	593	24.5
1969	178	98	100	66	20	193	655	27.2
1970	142	112	104	72	15	195	640	22.2
1971	178	132	126	79	21	207	743	24.0

U.K.—Rhodesian political differences was not possible. Britain is continuing its Rhodesian trade embargo, which began when Rhodesia declared its independence in 1965. Some countries trade directly or indirectly with Rhodesia, despite U.N. sanctions. The United States is now allowing American firms to purchase Rhodesian chrome and other minerals.

For Rhodesia's flue-cured crop, harvested early in 1972, growers received a guarantee equivalent to 32 U.S. cents per pound. Auction sales were delayed pending a possible settlement of the U.K.-Rhodesia political dispute. But when no settlement was forthcoming Rhodesia's government went ahead with sales again in secrecy. Growers may have increased their crop over the target of 132 million pounds.

Oriental leaf production increased 1 percent last year. Turkish growers maintained output, although crop quality was down. Sales of the 1971 crop began in January and the Turkish Monopoly paid higher prices than last year. The Monopoly continues concessional sales to reduce old-crop stocks.

In late March, the European Community established 1972 season prices averaging 5 percent higher than the previous year. Increases ranged from 2 percent for Italian burley leaf to 8 percent for Italian flue-cured. This season's rise follows a 6 percent rise last year.

Table 20.--Cash receipts from tobacco and percentages of total cash receipts from all farm commodities, by states, average 1964-68, annual 1969-71

State	Average 1964-68		1969		1970 1/		1971 1/	
	Tobacco	Percentage of total receipts	Tobacco	Percentage of total receipts	Tobacco	Percentage of total receipts	Tobacco	Percentage of total receipts
	Million dollars	Percent	Million dollars	Percent	Million dollars	Percent	Million dollars	Percent
North Carolina	504	40.4	516	36.6	576	37.8	562	36.8
Kentucky	294	38.7	301	33.9	303	32.7	271	28.7
South Carolina	92	23.2	99	22.6	101	22.2	101	21.6
Virginia	85	16.9	93	16.2	89	14.7	90	14.6
Tennessee	86	14.3	78	11.8	82	11.6	76	10.2
Georgia	81	8.3	76	6.6	102	8.6	92	7.3
Florida	28	2.6	32	2.4	31	2.4	27	1.9
Maryland	21	6.4	23	5.8	21	5.4	23	5.8
Connecticut	27	17.2	22	13.4	24	14.7	26	15.7
Pennsylvania	11	1.3	11	1.1	11	1.1	10	.9
Ohio	13	1.1	14	1.1	14	1.0	12	.9
Indiana	10	.7	10	.7	10	.7	10	.6
Massachusetts	10	6.1	9	5.4	11	6.7	11	6.7
Wisconsin	6	.4	5	.3	6	.3	9	.6
Missouri	3	.3	3	.2	4	.3	5	.3
West Virginia	3	2.7	2	2.3	2	2.2	2	1.7
United States 2/	1,275	3.1	1,296	2.7	1,388	2.7	1,328	2.5

1/Subject to revision. 2/U.S. total receipts from tobacco include relatively small receipts for a few States not shown separately.

Table 21.--Tobacco manufacturing corporations: Net sales, net income, and profit ratios, 1961-72

Period	Net sales	Net income		Profit			
		Before Federal tax	After Federal tax	Per dollar of sales: Before Federal tax	Per dollar of sales: After Federal tax	As percentage of stockholders equity (annual basis): Before Federal tax	As percentage of stockholders equity (annual basis): After Federal tax
	Million dollars			Cents		Percent	
1961	5,300	630	303	11.9	5.7	28.3	13.6
1962	5,340	634	306	11.9	5.7	27.1	13.1
1963	5,563	675	327	12.1	5.9	27.6	13.4
1964	5,836	664	345	11.4	5.9	25.8	13.4
1965	6,006	665	354	11.2	5.9	25.4	13.5
1966	6,570	727	389	11.1	5.9	26.3	14.1
1967	7,088	794	420	11.2	5.9	27.2	14.4
1968	7,859	896	436	11.4	5.6	29.7	14.4
1969	9,162	976	476	10.6	5.2	29.6	14.4
1970	9,839	1,098	569	11.2	5.8	30.3	15.7
1971	10,551	1,217	643	11.5	6.1	29.6	15.7
Quarterly 1971							
1	2,434	267	145	11.0	6.0	27.3	14.8
2	2,677	316	160	11.8	6.0	31.0	15.7
3	2,752	333	178	12.1	6.5	32.1	17.1
4	2,688	301	160	11.2	6.0	28.8	15.3
1972							
1	2,723	300	160	11.0	5.9	28.2	15.1

Note: Data includes non-tobacco enterprises of tobacco manufacturing corporations. Compiled and adapted from the Quarterly Financial Reports for Manufacturing Corporations, Federal Trade Commission--Securities and Exchange Commission.

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5/Available from Information Division, AMS, Room 1768, USDA, Washington, D.C. 20250.

Item	Unit or base period	1971 Apr.	1971 May	1972 Mar.	1972 Apr.	1972 May	Last data as percentage of a year earlier
Average price at auctions							
Flue-cured	Ct. per lb.	C - l - o - s - e - d		C - l - o - s - e - d			---
Burley	Ct. per lb.	C - l - o - s - e - d		C - l - o - s - e - d			---
Maryland	Ct. per lb.	79.7	78.6	Closed	83.2	82.2	105
Virginia fire-cured	Ct. per lb.	C - l - o - s - e - d		C - l - o - s - e - d			---
Ky.-Tenn. fire-cured	Ct. per lb.	C - l - o - s - e - d		C - l - o - s - e - d			---
Ky.-Tenn. dark air-cured	Ct. per lb.	C - l - o - s - e - d		C - l - o - s - e - d			---
Virginia sun-cured	Ct. per lb.	C - l - o - s - e - d		C - l - o - s - e - d			---
Support price 1/							
Flue-cured	Ct. per lb.	69.4		72.7			105
Burley	Ct. per lb.	71.5		74.9			105
Maryland	Ct. per lb.	No support		No support			---
Virginia fire-cured	Ct. per lb.	48.5		50.8			105
Ky.-Tenn. fire-cured	Ct. per lb.	48.5		50.8			105
Ky.-Tenn. dark air-cured	Ct. per lb.	43.1		45.2			105
Virginia sun-cured	Ct. per lb.	43.1		45.2			105
Connecticut Valley cigar binder	Ct. per lb.	49.5		51.9			105
Wis. binder and Ohio filler	Ct. per lb.	35.8		37.5			105
Puerto Rican filler	Ct. per lb.	37.1		38.9			105
Parity index 2/	1967=100	119	120	124	125	125	104
Industrial production index 3/	1967=100	106	107	110	111	112	105
Employment	Mil.	78.2	78.7	80.2	80.6	81.2	103
Personal income 4/	Bil. dol.	843.0	848.6	905.6	911.1	915.9	108
		1971 Mar.	1971 Apr.	1972 Feb.	1972 Mar.	1972 Apr.	
Taxable removals							
Cigarettes	Bil.	43.4	43.6	45.6	49.9	42.6	98
Cigars and cigarillos	Mil.	664.8	654.6	562.4	654.8	554.2	85
Accumulated from Jan. 1							
Cigarettes	Bil.	131.5	175.1	88.9	138.9	181.5	104
Cigars and cigarillos	Mil.	1,825.1	2,479.7	1,097.0	1,751.8	2,306.0	93
Invoiced to domestic customers							
Accumulated from Jan. 1							
Smoking tobacco	Mil. lb.	15.9			13.7		86
Chewing tobacco	Mil. lb.	16.9			17.2		102
Snuff	Mil. lb.	6.9			6.6		96
Tax-exempt removals							
Cigarettes	Bil.	4.0	3.4	4.4	3.7	2.7	79
Exports	Bil.	2.4	2.3	3.6	2.6	2.0	87
Cigars and cigarillos	Mil.	9.6	9.9	15.6	10.2	11.3	114
Accumulated from Jan. 1							
Cigarettes	Bil.	11.0	14.4	9.1	12.9	15.6	108
Exports	Bil.	6.9	9.1	6.2	8.8	10.7	118
Cigars and cigarillos	Mil.	33.8	44.3	37.1	47.2	58.5	132
Invoiced for export							
Accumulated from Jan. 1							
Smoking tobacco	Mil. lb.	.4			.4		100
Chewing tobacco	Mil. lb.	.2			.2		100
Wholesale price indexes 5/							
Cigarettes (reg. nonfilter)	1967=100	120.4	119.7	121.7	121.7	121.7	102
Cigars	1967=100	106.8	106.9	109.0	109.0	109.0	102
Smoking tobacco	1967=100	118.4	118.4	118.4	118.4	118.4	100
Plug chewing tobacco	1967=100	126.4	126.4	125.3	125.3	125.3	99
Snuff	1967=100	138.6	138.6	138.6	138.6	138.6	100
Consumer price indexes (urban) 6/							
Cigarettes (reg. nonfilter)	1967=100	125.6	125.9	133.2	133.7	133.9	106
Cigarettes (filter tip king)	1967=100	125.7	125.7	134.3	134.8	135.0	107
Cigars (domestic reg. size)	1967=100	105.8	105.9	110.3	110.6	110.7	105
Imports of tobacco							
Cigarette leaf	Mil. lb.	10.7	12.1	16.2	14.6	11.9	98
Cigar tobacco 7/	Mil. lb.	10.5	9.6	9.2	11.5	8.0	83
Accumulated from Jan. 1							
Cigarette leaf	Mil. lb.	36.0	48.1	29.5	44.1	56.1	117
Cigar tobacco 7/	Mil. lb.	29.8	39.4	17.8	29.3	37.3	95

See footnotes at end of table.

Continued -

Item	Unit or base period	1971 Mar.	1971 Apr.	1972 Feb.	1972 Mar.	1972 Apr.	Last data as percentage of a year earlier
Exports of leaf tobacco (farm-sales weight)							
Flue-cured	Mil. lb.	51.0	42.7	76.7	23.8	16.0	37
Burley	Mil. lb.	3.9	2.0	11.1	5.0	1.3	65
Maryland	Mil. lb.	.9	.4	1.1	.5	.6	150
Virginia fire- & sun-cured	Mil. lb.	.1	.4	.6	*	0	---
Ky.-Tenn. fire-cured	Mil. lb.	2.3	1.4	2.5	2.2	.4	29
Ky.-Tenn. dark air-cured	Mil. lb.	.2	.3	.2	*	*	---
Black Fat	Mil. lb.	.3	.2	.3	.4	.3	150
Cigar wrapper	Mil. lb.	.1	.2	.3	.2	.3	150
Connecticut binder	Mil. lb.	*	*	*	*	*	---
Wisconsin binder	Mil. lb.	0	*	*	0	0	---
Accumulated from beginning of marketing year 8/							
Flue-cured	Mil. lb.	418.9	461.6	377.3	401.1	417.1	90
Burley	Mil. lb.	20.2	22.2	20.1	25.1	26.4	119
Maryland	Mil. lb.	4.6	5.0	2.8	3.3	3.9	78
Virginia fire- & sun-cured	Mil. lb.	2.0	2.4	1.6	1.6	1.6	67
Ky.-Tenn. fire-cured	Mil. lb.	11.5	12.9	7.9	10.1	10.6	82
Ky.-Tenn. dark air-cured	Mil. lb.	.5	.8	.2	.3	.3	38
Black Fat	Mil. lb.	1.4	1.6	1.0	1.4	1.7	106
Cigar wrapper	Mil. lb.	1.1	1.3	2.3	2.5	2.8	215
Connecticut binder	Mil. lb.	.2	.3	*	.1	.1	33
Wisconsin binder	Mil. lb.	*	.1	*	*	*	---
Cigar filler	Mil. lb.	.1	.1	.1	.3	.3	300
Exports of manufactured tobacco in bulk	Mil. lb.	2.1	1.8	3.0	2.3	1.7	94
Accumulated from Jan. 1	Mil. lb.	7.2	8.9	7.5	9.8	11.5	129
		Quarterly data					
		1971 Jan.-Mar.	1971 Apr.-June	1972 Jan.-Mar.		1972 Apr.-June	
Stocks of tobacco--1st of quarter 9/							
Domestic types (farm-sales weight)							
Flue-cured	Mil. lb.	2,504	2,234	2,512		2,158	97
Burley	Mil. lb.	1,654	1,628	1,565		1,534	94
Maryland	Mil. lb.	50	41	46		40	98
Fire-cured	Mil. lb.	64	88	58		83	94
Dark air- and sun-cured	Mil. lb.	59	63	54		58	92
Cigar filler	Mil. lb.	114	133	98		110	83
Cigar binder	Mil. lb.	44	55	45		57	104
Cigar wrapper	Mil. lb.	26	25	23		22	88
Under Government loan 10/	Mil. lb.	1,371	1,321	1,149		1,009	76
Tobacco sheet 11/							
Cigarette types	Mil. lb.	29.2	31.4	26.9		27.6	88
Cigar types	Mil. lb.	2.0	1.7	1.8		1.8	106
Foreign types (farm-sales weight)							
Cigarette and smoking	Mil. lb.	386	386	339		377	98
Cigar	Mil. lb.	99	104	83		87	84
Tobacco outlets 12/							
Seasonally adjusted data, annual rates, for charts, p.2							
Cigarettes							
Production	Bil.	577.2	565.6	618.4		596.0	105
Taxable removals	Bil.	532.8	524.8	564.0		555.0	106
Cigar production	Bil.	8.01	7.96	7.52		7.69	97
Smoking production	Mil. lb.	70.9	58.2	60.5		57.0	98
Chewing production							
Loose leaf	Mil. lb.	40.9	45.1	50.3		51.7	115
Plug and other	Mil. lb.	29.3	28.4	26.3		26.7	94
Snuff production	Mil. lb.	26.0	27.1	26.5		26.9	99
Exports of leaf							
Total	Mil. lb.	770.6	646.8	1,303.1		444.0	69
Flue-cured	Mil. lb.	708.9	499.7	1,168.5		411.0	82

1/1971 and 1972 crops respectively. 2/Prices paid by farmers including interest, taxes and wage rates. 3/Seasonally adjusted. 4/Seasonally adjusted, annual rate. 5/Excise tax excluded. 6/Federal and applicable state and local taxes included. 8/July 1 for flue-cured and cigar wrapper and October 1 for others. 9/Holdings of manufacturers and dealers including grower cooperatives. 10/Reported by grower cooperatives. 11/Weight of tobacco leaf not including stems added. 12/Data for most recent quarter are preliminary estimated. *Less than 50,000 pounds. Detail may not add to total due to rounding.

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